



MARKET RESEARCH: HIKING IN EUROPE

Hiker's profile and behavior

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1. Definitions

1.1 Walking tourism in general

Walking tourism is generally perceived as a form of soft adventure tourism and/or special-interest tourism activity which is being covered by the adventure tourism and/or nature-based tourism umbrella. Walking tourism is closely connected with community-based tourism, and leaves therefore a positive impact on the visited destination. On average, every €1.38 invested in walking tourism development yields almost €18.00. (CBI: Ministry of Foreign Affairs, 2021)

walking tourism is one of the most popular ways in which tourists can see a destination up close and be active during their visit and allows visitors to directly and deeply experience a destination through their five senses, promoting meaningful interactions with local people, nature, and culture along the way. Walking tourism has the potential to bring several social and economic benefits to local communities engaging in the development of the route, and helps to disperse the concentration of tourism from hotspots and off-peak season. (Kameyama, 2019)

Walking tourism has the following benefits for the region.

- It is relatively easy to develop, small investments are needed.
- It does not require special assets.
- High market potential.
- It complements other tourism resources.
- When managed and developed properly, it is a sustainable form of tourism
- High socio-economic benefits for local people.
- Potential to promote residents' wellbeing.

The five key elements to be considered:

- Route characteristics (safety, level of difficulty, attractiveness, and access).
- Necessary facilities.
- Maintenance system.
- Economic opportunities (culture programs, links to local tourism (gastronomy, wine tourism, etc), accommodation, transports, retails).
- Marketing and commercialization.

1.2 Definitions and description of niche markets applying to the Sultans Trail

- **Hiking:** requires more effort than walking. The difficulty of the activity varieties between easy, intermediate, and challenging walks through rocky, hilly, and remote natural landscapes o designated or complicated natural trails and/or footpaths. Three types of

hiking are: day hiking, summit hiking, and long-distance hiking. A trip lasts a day or with overnight included and is generally 4-50km long.

- **Trekking:** duration of the trip is longer than hiking and spans at least 2 days in succession of 7+ hours walking per day. Distance varies highly between 50km until even 24.000km. it follows off-road directions (cross-country, unpaved roads, complete wilderness, higher altitudes), but may also be carried out on established trekking routes with corresponding tourist infrastructure. An example of a trekking route is pilgrimages.
- **Long Distance Walking:** is at least 30km, and is, therefore, more than escaping everyday life for a few hours. Special designated long-distance footpaths are widespread with sometimes (basic) accommodation facilities on the road. Sometimes the path follows an elevation difference and goes (possible) through rough terrain. Long-distance walking crosses varying landscapes, which makes it a favourite activity for many Europeans.
- **Specialist/Nordic walking:** roughly defined as a walking activity through the countryside with the help of long poles for support. Originated in Finland in 1997 as a means for cross-country skiers to train in the summer period. The popularity of Nordic walking is increasing in other European countries as well.
- **Hillwalking:** Mainly a British equivalent of walking in hills and mountains, similar to hiking. Challenging and rocky terrain is encountered.
- **Backpacking:** similar to hiking. Backpacking is done for multiple days and requires more preparation and equipment. (CBI: Ministry of Foreign Affairs, 2021)

The corona pandemic gave an impulse to walking and outdoor tourism because it was one of the few activities that were still possible to carry out in big parts of Europe. A significant part of the new walkers/hikers will stay in the market and will develop this activity into a new hobby. However, already before corona, the walking tourism market grew steadily each year. Market research forecasts that the global adventure tourism market, of which walking tourism is a part, will increase by 13.3% per year from 586.3 billion dollars in 2018 to 1 626.7 billion dollars in 2026. Europa will grow by 11.9%, both soft and hard adventure activities are expected to grow. 50% of European tour operators are active in walking tourism (CBI: Ministry of Foreign Affairs, 2021)

1.3 Cultural routes and landscapes

Berić (2013) states that a cultural route is described as a route that passes through multiple regions or countries representing a common theme selected by the organization behind the route initiative. A theme based on significant historical, artistic, or social elements which are being associated with that specific geographical location.

Moreno-Kamińska (2020) defines a cultural landscape as a place with an anthropogenic transformation of a natural landscape by the development of civilization. A landscape with

variety combining natural elements and long-lasting cultural products established over multiple generations. The cultural landscape is subject to constant changes due to human interaction based on the time-depending potential of the area to fulfill growing economic, technological, historical, and social needs of civilizations. “the cultural landscape is a peculiar heritage of individual regions, as it documents the activity in the geographical space of societies from many historical epochs”. Cultural routes are a way to represent the cultural landscape to tourists, and the cultural route itself is a greater cultural value than the sum of all its components. (Moreno-Kamińska, 2020) http://www.erjournal.ru/journals_n/1375815260.pdf

2. Market segmentation and characteristics of walking tourism

The average education of the European walkers is quite high, and they have money to spend. European walkers are explorers and willing to explore what is around them, absorbing historical, cultural, natural, and culinary aspects of a place at a relaxing pace is the core. Learning something new is essential. It doesn't matter if the activity is part of a tourism package or the only activity for that period. Important is to have safe, marked, and defined routes. Another kind of walker has the motivation to achieve a certain performance and to improve their health condition, side activities do not really apply to them. (CBI: Ministry of Foreign Affairs, 2021)

Walker tourism can be divided into three segmentations

- ***Serious/committed walkers***

Highly motivated and experienced walkers looking for something new and extraordinary. This type of walker is expecting relatively difficult routes with high-quality products and services included with the tourism package. Eager to participate in long walking itineraries and activity is mainly undertaken during a holiday season.

- ***Casual walkers***

Medium motivation to walk and generally one of the multiple activities undertaken during a holiday. The activity takes up to 0.5 to 2 days and the walker prefers a more leisure/recreational, moderate/easy walk as a means to explore and experience a destination, the local people, nature, and culture.

- ***Healthy walkers***

With a motivation between medium to high, and aiming to enhance their health by walking, it is key for healthy walkers' that activities meet personal health conditions. The walking activity is often combined with other healthy activities such as wellness, food, etc.

The Dutch walkers are segmented by The Brand Strategy Research model (BSR lifestyle model, figure 1) is used to create a segmentation of the Dutch walkers by creating multiple walker profiles (figure 2). The model also applies to other Western European countries. (CBI: Ministry of Foreign Affairs, 2021), (Wandelnet & SAMR, 2021)

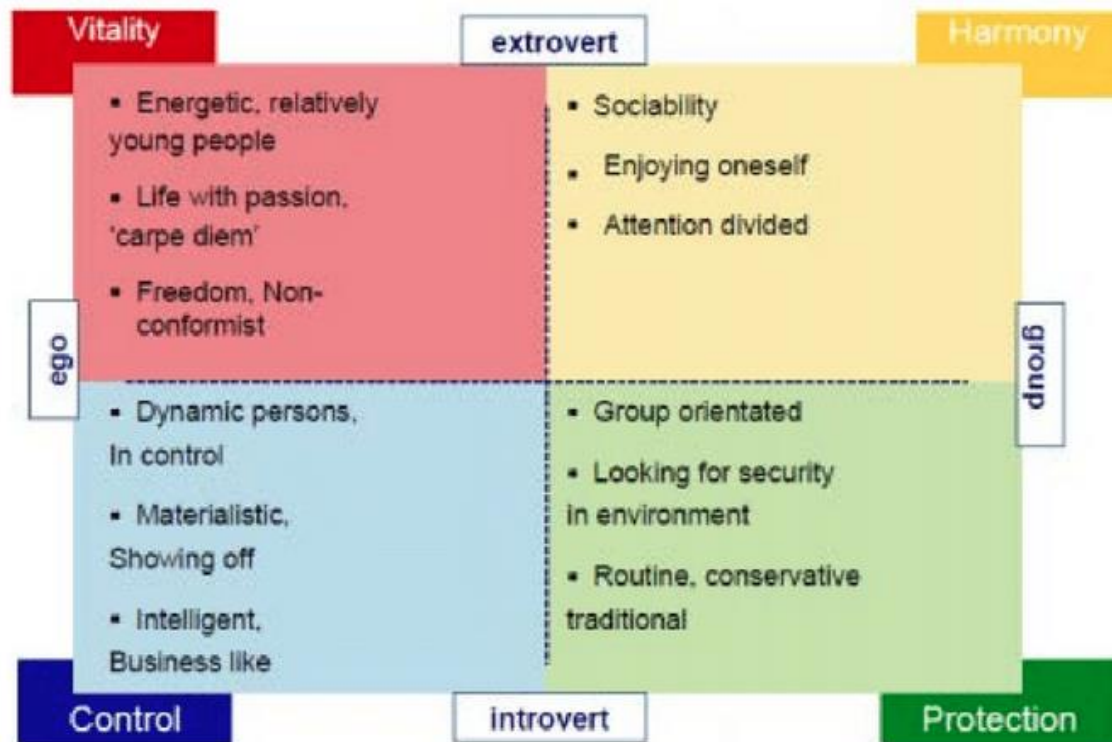


Figure 1: The BSR model functions by grouping characteristics, incentives, motivations, and lifestyle choices into multiple segments and connecting them to the nominal variables inside a research subject. (Bosma, 2017)

Type of walker	Who	What	With	Trail characteristics
Adventure walker	Women, 25–34 or 45–54 years old	• Off-road • Getting to know new environments • Unwind • Taking nice pictures • Encounter special animal(s)	Alone or with friends	• Unpaved • No signage • Alternated • Narrow and less walked paths

Cultural walker	More often women, 65 years or older	• Reliable routes • Routes need to be in good shape • Pleasant company	Friends, relatives, family	• Attractive environment • Combination of culture and nature
Organised walker	Women, 55 years or older	• Organised • Marked walking tour • Resting points included • Information on health	Partner, family, group	• Route must deliver the possibility to unwind • Marked by professionals • Clearly described • Varied • Possibilities to rest • Sanitary facilities
Social walker	45 years old or younger	• Prefers tours of 1–2 hours, sociability is central • The presence of catering facilities on the trail are considered important	Family, friends	• Catering facilities included • Little adventurous
Performance walker	Men, all age categories	• Sportive challenge	Alone, participant walking event	• Route tracking independently • Either physical challenge or pretty environment • Enough to experience
Quiet/Calm walker	More often men, 25 years or older	• Clearly defined route • Easy to reach starting point	Alone, partner	• Lots of forest, nature • Little or no background noise

		Photographing is part of the experience		(for example highways)
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Table 1: The six segmentation of walkers from the Netherlands, applicable to other Western European countries. (CBI: Ministry of Foreign Affairs, 2021)

3. Different typologies of hikers

3.1 Cultural landscape hikers

To create a picture of the cultural landscape hiker, first, the definition of cultural landscapes needs to be found. Conkey (1980) described a cultural landscape as a landscape created and altered by human symbolism. Environmental symbolism is a method whereby reality and social identity are created by society as a means to respond to cultural stress and is, therefore, a social process of the community. Related to the tourism aspect of cultural landscapes, Francisco Rejón-Guardia (2019) noticed a shift in high cultural consumption from tourists visiting museums and heritage sites towards cultural tourism with a more popular taste based on the enjoyment of natural or cultural heritage and creative activities. One of the reasons for a cultural landscape to become increasingly more popular is because the visitors have intrinsic motivation and the wish to recognize and experience the presence of indigenous people and to reject modern representations of this (Plumwood, 2006). When taking this into consideration, cultural landscape hikers are culture seekers who are searching for a different method than the traditional one to experience cultural heritage. The descriptions above fall in line with what Zabbini (2012) describes as modern cultural routes. The growing integration of cultural heritage as a fundament in combination with tourism experiences is getting more popular in recent years. Because hikers of cultural routes have the common expectation of exploring a culture to experience the local identity based upon an image, folklore, a subject, history, or myths. Therefore, hikers of cultural routes provide a perspective on creating a profile of hikers of cultural landscapes in general. Due to the link with culture

One small quantitative research conducted on the cultural route ‘The Israel National Trail’ focuses on the background and the motivation of the route its visitors. The questionnaire was focused on domestic hikers, nonetheless, this information could be valuable to identify the domestic hiker profile of cultural routes. The motivation for hikers to walk the trail was mainly to spend time with friends, all responded with this answer in a multiple response question. Other popular reasons were the love of nature (91%), love of the country (76%), and physical and athletic (68%). The least given motivation for walking the trail was out of spiritual, religious, and cultural reasons (44%). Furthermore, male participants (57%) counted for more than half of the hikers who filled in a questionnaire along the trail compared with females (43%). The biggest age

group (42%) was between the age of 20-29, with the second biggest group (21%) between the age of 50-59. A small group was religious (10%) while the biggest hiker group was non-religious (90%). Another interesting number is the percentage of participants who walked the trail in segments (66%) and who walked the cultural route in one trip (33%). The education level of the participants was mostly at least bachelor education (43%), or master and higher (46%). Remarkable is that cultural motivation for hiking the Israel National Trail was least popular, considering the trail to be a cultural route.

According to Malaescu (2015), the main motivation for cultural tourism routes varies greatly but has one important attribute which distinguishes cultural routes from other long-distance trails. Namely, the cultural route is the best way of keeping alive local ancestral culture sufficiently preserving endangered cultural and historical elements of universal interest. "with the main function of the hosts being the remembering of the forgotten places and times and the opportunity to perpetuate, by conveying to tourist, their ancestral culture, the reappropriation of a common past or the rediscovery of their collective memory." Because of this, cultural routes sometimes function as a support for an approach to personal identity, developing a collective feeling of regional pride. Creating a shared feeling of pride based on a regional history has the problem of bringing up social tensions, which is one of the biggest challenges for cultural routes based on historical elements. Nonetheless, the commodification of local cultural resources for the tourism industry necessary to receive visitors is the most relevant for these regions. (Malaescu, 2015)

As reflected on the Israel National Trail, love for one's country was one of the biggest reasons to hike the cultural route. The cultural and historical attributes of a cultural route are one of the most important selling points of this tourist activity and are mostly known locally by people who identify themselves with those same cultural and historic elements as part of their persona. Therefore, most visitors who walk the route as motivation to explore the cultural and historic elements of the route, are mostly people who are already familiar with the subject and the theme of the route one way or another, which are mainly locals. Other reasons and motivation to walk the route can be found in other long-distance hiking routes as well, such as the reason for experiencing an inner journey and reflecting on oneself. This could be a reason why the name of pilgrimage, instead of cultural, is more effective in attracting international hikers. Pilgrimages are the embodiment of experiencing an inner journey most long-distance hikers in all subcategories are searching for, while the motivation of exploring cultural and historic elements is a subcategory on its own and mainly reserved for hikers who are already (highly) familiar with the theme of the route, therefore attracting more regional visitors. (Malaescu, 2015)

3.2 Whole itinerary/long-distance route hikers

A long-distance hiking route is defined as a route that takes more than two days for hikers to walk (M. A. Garcia Sastre, 2015). The Mull long-distance route (LDR) is a route of around 2000km in Scotland. The clearly defined and well-marked hiking route is used a lot by locals in form of recreation, leisure, dog walking, and health & fitness in form of latent demand. Accessibility and comfort are hereby important factors for casual use by locals. While locals make frequent use of the trail, the target audience is long-distance hikers. The LDR market is increasing in recent years, mainly because of a burgeoning number of 'serial LDR users'. These serial LDR hikers plan their next hiking route before they have finished their current one. Therefore, according to Wood-Gee (2014), 40% of the West Highland Way revealed that this LDR was not their first one. 80% of the interviewed claimed to walk the LDR again. A survey in 2006 suggests that 75% of experienced LDR users would walk another one in the next 5 years. Several route managers have suggested these factors contribute to increasing interest in LDRs among hikers:

- advertising with 'staycations' in preference of holidays abroad. (locally)
- the ready availability of baggage transfer and other support services. (convenience and security)
- increasing interest in health and fitness.
- availability of information. (internet, books, apps)
- more effective and proactive marketing, both as an individual trail (Sultans Trail), and collective branding (Culture Routes Society).
- increasing availability and range of tourism package deals for LDR (collaborating with tourism agencies).
- positive media coverage in regions with the presence of the target audience.

results of an unpublished survey from 2012, most people partaking in the Great Glen Way arrived at the start by public transport (65%). People are mainly from Scotland (29%), elsewhere in the UK (31%), and from the rest of Europe (31%). Other parts of the world counted for 9%. Most people are male (56%) against female (44%). The majority of the people walked in pairs or couples (54%), while other people walked alone (22%), or in a 3-4 people group (15%), or in bigger groups of 5+ individuals (3%). The age distribution of the trailers was as follows 30% was 35-50, followed by 29% was 18-34, then 26% was 51-64, around 8% was 65+, and just 7% was <18. (Wood-Gee, 2014)

To summarize the biggest trends. Around two-thirds of the users were 'locally', UK residents, and originated from Europe as the second biggest group. More than half of the walkers fell into the 45-65 age range, and most hikers are male.

Interesting is that Wood-Gee (2014) mentions that LDRs are similar to pilgrimages on their own because most hikers, pilgrims or not, are walking and experiencing a personal journey. Depending on the hiking route, many hikers of pilgrimages are doing this with different motives than the religious motives, and many who walked the pilgrimages also walk other LDRs.

Many bikers experiencing the long-distance hiking route are bringing their own bike when the starting point is easy to access. A decent infrastructure network is therefore necessary. Depending on the route and segments of it, mountain bikers could be interested in the trail too. Most cyclists partake in the route in organized groups instead of solo.

Regarding user experience, the following factors contribute the most to the success of LDRs:

- presence of Iconic landscapes along the route.
- impressive scenery (33% of the responders mentioned this as a key feature)
- variety in scenery and terrain
- the trail should offer a challenge, but not too much (for 35% this was the primary factor for the trail)
- minimum distance on bound or road surface
- a clean and structured path, but informal (for example sand/forest paths)
- quality waymarking and clear signage
- quality infrastructure is essential and spreads through the community via word-of-mouth
- historic and cultural elements
- Carefree and easy access to the starting point and finish line by public transport
- distance achievable in under a week (or segments for a 1 week < LDR)
- available support services such as baggage transfer.
- suitable and comforting accommodations at intervals of 16-24 km
- efficiently available food and other refreshment stops along the route. (supplies)
- Effective marketing
- within a short range of bigger population centres (close to bigger cities)

3.3 Route segment as tourist product hikers

While the theme of a cultural route attracts mostly visitors who are already familiar with this theme, one effective way to introduce visitors/hikers to this specific theme is by offering clearly defined touristic attractions which present comparable cultural and historic elements of the cultural route it is part of. For example, a Hungarian-Slovakian cross-border initiative program from 2007 until 2013 provided culturally themed tours named “Tours without Borders” to provide tourism packages along three thematic routes: the Gothic Route, the Iron Route, and the Forts and Castle Route. The three thematic routes involved museums and exhibitions showcasing cultural and historic features of the thematic route which played a very important role in the tourism offer of the region. The academics conducted quantitative research which shows that only 60% of involved stakeholders (entrepreneurs and tourism organizations) had heard of the thematic routes before while the study shows that 81% of their guests would have been interesting in these thematic routes. (Nagy, 2021)

http://phd.lib.uni-miskolc.hu/JaDoX_Portlets/documents/document_13622_section_5778.pdf

Regarding the profile of participants in hikes as part of a tourism package, the websites of tourism operators offering hikes provide an insight into the target group. For example, ‘EuroHike’ (as part of the German EuroFun) provides ‘all-round perfectly organized’ personalized walking holidays since 1991. The offering is always 7 or 8 days with a hiking duration of 4 to 6 hours per day. The provided package is luxe with services such as luggage transfer, luxury accommodations along the route, detailed route description, return transfer to the starting point, sometimes multi-course dinner included, multi-language information (or voucher for it), and offering with many tips & tricks for preparation and orientation in form of blogs. The overabundance of tips and tricks, and the family-friendly service, give the impression that the packages are mostly created for beginners or casual hikers.

Another holiday package provider for group- and solo hikers is ‘Utracks’, an Australian-based travel company operating mainly in Europe. The tour operator offers multiple self-guiding tours (hiking and cycling) for beginners but also more experienced hikers. The aim of the tour operator is to deliver service, comfort, and security in such a matter that the hiker or cyclist can enjoy the route free from all worry. Accommodation, luggage transfer, tickets, and guided tours are all included and flexibility is offered to extend the package when wished for.

It seems that both tour operators start offering tours at around 600 euros. The main difference between packaged holiday tours for hikers is that the focus is on the holiday as a method to relax and comfort and less on self-reliance and creating an inner journey which are important attributes of long-distance hiking routes. Even when considering that tour operators ask tourists

to be physically fit for the more challenging routes, the focus is on comfort, and the tour operator advises to not stress our comfort zone too much. The contributing elements to the hiking experience are focussed on a combination of landscape, nature, and being part of the 'hype' while focussing less on the cultural aspect of the hiking route. The 'hype' of some long-distance routes is focussed on the social aspect of walking the route and operators encourage bookers to be 'part' of the trail experience. This especially counts for the most popular pilgrimages such as the route of Saint James to Santiago de Compostela, and the Via Francigena. Depending on the operator, the whole route instead of segments of popular routes are optional, but pricing starts at 4 000 euros. Nonetheless, while many tour operators focus on the hiking holidays with the perspective of comfort, service, and relative luxury, the first paragraph of this heading suggests that there is a potential market for tourism packages for hikers focussing on cultural and historical elements of the hiking trail, instead of the social one.

Links to the website of tour operators offering tourism packages for hikers, offerings are mainly segmental tour packages

<https://www.utrack.com/>

<https://www.eurohike.at/en/travel-information/faq>

<https://www.innwalking.com/hiking-tour/rhodope-self-guided-walking-bulgaria/>

<https://www.onfootholidays.co.uk/>

3.4 Pilgrim hikers

While the motivation of pilgrims in the Middle Ages was overwhelmingly religious and mainly aimed to reach a certain destination (Santiago de Compostela), nowadays hikers have a different motivation for using the pilgrim way than their ancestors. Recently, Pilgrim routes are mainly walked for symbolic purposes and the journey is for many often more important than reaching the holy site as a destination.

Researchers interviewing hikers along the Pilgrimage to Nidaros, Norway has conducted quantitative research to discover the motivation. They discover that the motivation of people walking the modern Pilgrim routes experience an evolving and shifting motivation as they progress along the route. Most people are searching for experiences that are different than everyday life at home not only by religious and spiritual change but also by enjoying the slow-progressing journey and appreciation of the natural environment, changing landscapes, and learning about history and culture. Pilgrim routes represent a wide range of practices and identities and therefore hikers have often different motivations for undergoing the experience. The route of pilgrims goes through many towns and villages, old churches, or other cultural buildings, changing landscapes, and historic sites. Because the same attributes can be found along many other long-distance routes in general, many people walking the Pilgrim route find

similar experiences in walking other long-distance hiking networks. Therefore, Pilgrim routes often show parallels with other long-distance routes as a form of nature-based tourism and adventure tourism for recreational purposes. The physical external elements of the Pilgrim routes transfer into a person and spiritual 'inner journey' (O. I. Vistad, 2020).

"While each pilgrim's motivation for beginning the pilgrimage tends to differ, an appreciation for Norway's wide, open, natural spaces and a desire to connect with nature, as well as an opportunity for quiet contemplation and introspection continue to be very important factors in starting the pilgrimage in Norway and Sweden". (O. I. Vistad, 2020)

Of the Hikers walking the Pilgrimage to Nidaros, most people came from Germany (40%), or Norway (24%), other European countries count for 30%, and visitors from outside Europe counted for just (6%). The researchers mentioned that 48% were male, 52% female and that the overall average age was 44 years. Most responders (46%) had completed more than four years of higher education, another 28% had four years or less of higher education, 17% completed high school, and only 9% have only finished Secondary or Middle school (O. I. Vistad, 2020).

The Case-study research conducted on the Portuguese route of Caminos de Santiago shows similar results regarding the hiking experience of walking the pilgrim route. The journey was at least as important as the destination of the route itself. The purpose and motivation of the hikers walking the Portuguese route of Camino de Santiago responded with: leisure and recreation (39%), religious (35%), and cultural reasons (33%), as top answers. Other answers were out of curiosity (23%), sport (17%), and spiritual (5%). On the question why this specific 'Camino' instead of another one mentioned the responders the culture and landscape of the route (44%), that this Camino is not overloaded (24%), and 16% answered that the route has a good atmosphere. The researchers also researched the demographics of the hiking route to create a profile of the hiker. The answers showed that 55% of the hikers were male, against 45% female; 46% of the responders were married, 46% single, and 8% divorced. And the largest group of responders (22%) was between the age of 40-49 years, with an average of 43. Other age categories are 20-29 with 16% representation and 30-39 with 18% representation. Furthermore, the majority had finished a form of higher education (56%). Responders from the Portuguese Camino were Portuguese (34%), and Spanish (8%) from origin. Of the non-Liberian responders (57%) the most important source countries were Germany (30%), Ireland (15%), and England (12%), making up for more than half of all the foreign responders walking the Portuguese Camino (Cassandra, 2012).

The motivation of hikers walking the Pilgrimage in Portugal/Spain is similar to the motivation of hikers walking the pilgrimage in Norway. Both groups hiked the route mainly to enjoy the natural, cultural, and historic environment, and most hikers agree that the journey is more important

than the destination. Nonetheless, the biggest difference between the Portuguese Camino de Santiago and the pilgrimage of Nidaros is the religious motive. A potential explanation for this is due to the difference in nationalities hiking the path. Responders walking the Portuguese Camino were mainly from Portugal and Spain, which are relative religious countries, while most hikers walking the Nidaros pilgrimage were German or Norwegian, two less religious countries. It seems that the religious motive for hiking the Pilgrimages is correlated to the background of the hikers visiting, which shows a correlation with the geographical location of the Pilgrimage on the map. Besides the religious motive, which depends on the location, Pilgrimages show many similarities regarding motivation and experience with long-distance hiking routes as tourist activities. And the profile of the Hikers walking the Pilgrimages of the Norwegian Nidaros and the Portuguese Camino de Santiago is highly comparable with the hiker profile of other non-religious long-distance routes elsewhere in Europe (Cassandra, 2012).

4. Hiking market per country

4.1 European hiking market

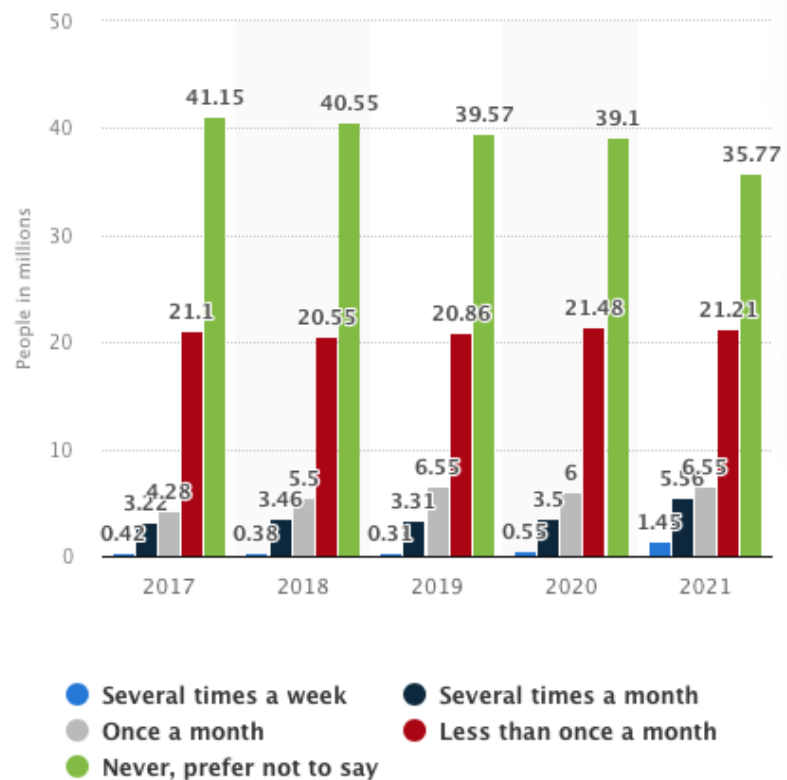
According to a study conducted in 2007, comparing Portuguese hikers with global hikers, a general description of European hikers was given. This general description could make it easier to identify national and local hiking behaviour compared to European hiking behaviour. The research shows that the distribution between males and females was balanced and that the biggest group was in the age range of 25 and 54 years. With 63% of the participants who completed a form of higher education, the average hiker is relatively highly educated. Most people were top- or mid-management (29.3%) and students (19.6%). Most foreign responders to the questionnaire were of French nationality (54%), then Dutch (11%), German (9%), and English (9%). Most people lived in cities (58.5%) which supports the main motivation of hikers to escape daily life (49.5%). The most popular time for hikers to hike is during the summer break. Other motivations are linked to the enjoyment of nature for its fresh air, beautiful landscape, and to explore nature in an involving way. The main source of information came from informal information sources, mainly via recommendations by friends and relatives. Most popular types of accommodation showed a preference for camping sites. Expenditure, in general, was low to a maximum of 25 euros per day. The most valued attributes of the hiking trail by hikers were the quality and conservation of the landscape, availability of information about the trail, a well-marked/signed path, and the experienced silence. The main obstacles were identified as walking through dangerous places, difficulties in receiving assistance when in an emergency, and lack of security on the trail. (Á. Rodrigues, 2007)

The survey is conducted in 2007, a time in which widespread accessibility of GPS was more limited, and hiking applications did not even exist yet.

4.2 Germany

Vidal-González (2020) states that the German hiking market is growing and that the hiking market is getting more experienced in hiking. According to the research, in 2010, inexperienced hikers accounted for 46% while this share has decreased to 29% in 2014. According to research done in 2018, around 80% of the hikers stated that they walk frequently to occasionally. This group is being described as more experienced hikers. This could be explained by the fact that Germany has between 300.000 and 400.000 km of hiking trails. Of this number, 200.000km exist out of paved trails, which are marked and maintained by volunteers. An additional 200.000km hiking path is established by several initiatives, local authorities, nature, and national parks, and regional tourism associations. Even when considering that Germany has a big and developed hiking market, the “typical German hiker” does not exist, because needs and motives are depending on age.

According to a survey (n = 23.000 – 23.300) on the frequency of recreational hiking in Germany 2017-2021, over 5.5 million Germans above the age of 14 state that they go hiking in their free time several times a month. Following the graph (image 1), the clearly visible trends suggest that more Germans started to hike in these 4 years. The percentage of people that never hiked decreased from 41.2% in 2017 to 35.8% in 2021, while the number of monthly hikers increased from 4.3% to 6.6% in the same period. People who hike several times a week increased from 0.4% to 1.5%, a small absolute growth, but significant from a relative perspective. Tips to improve the hiking trail are mainly focused on the trail’s safety, improving control/security, and assistance in case of disorientation.



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[Additional Information](#)

[Show source](#)

Figure 2: Result of a survey among the German population regarding hiker behavior 2017-2021.
<https://www.statista.com/statistics/413018/frequency-of-recreational-hiking-germany/>

4.3 United Kingdom

It is difficult to estimate the total number of hikers in the United Kingdom because there are many definitions of hiking. People can go hiking, but also walking, rambling, trailing, hillwalking, and more. All these definitions are very similar. Nonetheless, the British government has released a statistical study reflecting the walking- and cycling behaviour of British adults in 2019, and compared this with statistics of previous years. The results show a mild decrease in mileage per person walked in 2019, after an increase in the years before. The total number of trips and the distance covered decreased by respectively 5% and 1%. For leisure, 51% of the British adults enjoy walking and 42% use walking as a method of transport. According to Davies, (2019), British 'hill walking' is with over 2 800 000 participants the 6th most popular sport activity in the UK and is more popular than cricket, rugby and football put together. A further 315 000 people frequently participate in climbing and bouldering (Department for Transport, 2020). The online

news website Inews mentions that hiking has increased in popularity since the pandemic. For example, the Rambles organization saw an increase of 30% in a year. In total, more than 25% of the British population have taken up hiking to balance physical and mental health due to the pandemic (Cuff, 2020).

4.4 France

Hiking is a popular activity in France, with 64% of the French people planned to go hiking during their 2020 summer vacation, and is the most practiced sport in the country. Most hikers in France are older participants between 65 to 69 years and very few people under the age of 40 participate in hiking. French people mostly autonomously without being a member of a 'hiking club' and describe themselves as mainly beginners. This is remarkable given that 44% of the hikers in France practice at least once a week. A type of hiking that has increased in popularity among younger French people in the past 20 years is Nordic hiking. Coming from Scandinavia, nordic hiking is an activity fitting for the French mountains. The country has a relatively extended hiking network which is being managed by the French Hiking federation. The federation's first hiking trails, called the Grande Randonnée established in 1947, which means that the French hiking tradition is relatively old compared to other European countries. The main motivation for the French people to hike is to return to the natural environment, which fuelled the construction of the first camping site as early as 1936. Hiking is considered a trendy activity, given that hiking in the second half of the 40s was mainly for the wealthier civilians. (Statista Research Department, 2020)

https://www.statista.com/topics/7336/hiking-in-france/#dossierSummary_chapter2

4.5 Italy

While there are many famous hiking trails in Italy, and many internationals visit the country to appreciate its cultural landscape by hiking, the Italians themselves do not hike much. One of the few available sources on this matter from 2014 shows that more than 50% of the Italians never exercise and is therefore above the European average of countries with a population that is least active in sport activities. Regarding walking in general, 39% of the Italians declared that they are unwilling to walk for 10 minutes or more. This is in contrast with Scandinavian countries. Just 15% of Finns, 14% of Danes, and 9% of Swedes never claim to exercise. Italians do not hike much for several reasons, such as not having enough time, lack of interest, having a disability or illness, or that hiking is too expensive. Therefore, hiking is not even in the top 10 most practiced sport activities in Italy. (The Local Italy, 2014)

Figure 4 shows the motivation of both the Italians and internationals who did hike in Italy. The sample size was 32671 participants and >95% were of Italian nationality. Of the responders,

50.1% hiked with the reason to explore new places, 48.6% of hikers had as motivation to spend time in nature, 45.8% for physical and mental well-being, 35.8% went trekking, 32.8% for cultural reasons.

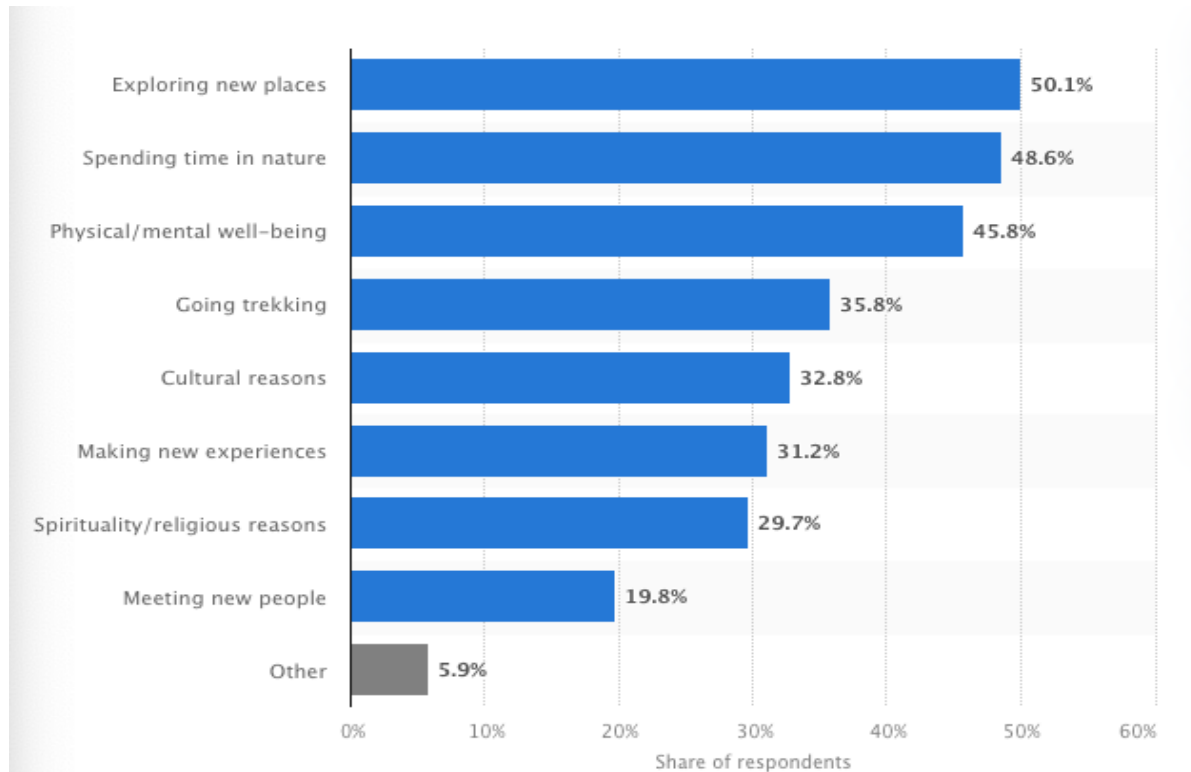


Figure 3: Main reasons for hiking according to individuals hiking in Italy in 2020.
<https://www.statista.com/statistics/1084398/main-reasons-for-hiking-in-italy/>

Furthermore, Beltramo (2014) interviewed Hikers arriving at mountain huts located in Italian mountains and created a profile of Italian hikers (n = 372). Italian walkers share a similar profile compared to hikers from other Western European countries such as France and Germany, at least regarding demographics. Around 50% of the interviewees are in the age range of 41 – 65, and another 26% are between 26 – 40 years. The other 24% is equally divided between < 25 years and > 65 years. The difference between most other Europeans is that just 31% of the Italians have a degree, compared with the often 60% from other western European countries. Most people of proclaimed to be an employee (28%), retired (15.6%), or a businessman/freelancer (14.25%).

5. Hiker Profile of Santiago and Rome

5.1 De Camino de Santiago de Compostela

Research conducted in 2019 reflects the visitor numbers and explores the motivations and identity of hikers walking de 'Camino de Santiago'. As table 2 beneath suggest, over 90% of the 320.000+ visitors arriving at Santiago de Compostela following the Camino do so by walking in 2018, and a little over 5% reaches the city by bike. While the table does not differentiate itinerary from segment walkers, it is known that to receive a certificate, walkers need to have bridged at least 100km of the route. The number of visitors is still growing (H. Kim, 2019).

Table 2. Means of travel and motivations of *Compostela* recipients.

	Year	2011	%	2012	%	2013	%	2014	%	2015	%	2016	%	2017	%	2018	%
Means of travel	On foot	153,078	16.00	164,749	85.60	188,187	87.17	210,939	88.67	237,707	90.19	254,025	91.42	278,490	92.51	306,064	93.49
	By bicycle	29,948	83.00	27,406	14.24	26,649	12.34	25,325	10.65	25,343	9.66	23,347	8.40	21,933	7.29	20,787	6.35
	On horseback	314	0.19	281	0.15	977	0.45	1520	0.64	326	0.12	342	0.12	417	0.14	318	0.10
	Wheelchair	11	0.01	22	0.01	66	0.03	98	0.04	71	0.03	125	0.04	43	0.01	79	0.02
Motivations of Compostela recipients	Religious and other reasons (cultural)	93,156	51.00	101,155	52.56	117,788	54.56	120,409	50.62	141,967	54.09	132,660	47.74	147,662	47.39	156,720	47.87
	Religious	78,972	43.00	79,477	41.30	86,284	39.97	101,012	42.46	99,671	37.98	122,973	44.26	130,831	43.46	140,037	42.78
	Not religious (cultural)	11,250	6.00	11,826	6.14	11,807	5.47	16,461	6.92	20,809	7.93	22,221	8.00	27,543	9.15	30,621	9.35
Total		183,378	100	192,458	100	215,879	100	237,882	100	262,447	100	277,854	100	301,036	100	327,378	100

Source: Pilgrim's office Statistics [49].

According to the official site of the pilgrims' route (Oficina del Peregrino, 2019), in 2019, a total of almost 350.000 visitors walked at least a part of the Camino. The biggest group of hikers (48.7%) did so because of both religious and non-religious reasons, 40.3% had solely religious motives, just 11% did it not for any religious reasons. Most walkers (54.5%) finishing the route are between 30 and 60 years old, 26.7% are younger than 30, and 18.7% are older than 60. Most present nationalities are Spanish (42,1%), Italians (8.27%), Germans (7.53%), Americans from the US (5,9%, and Portuguese (5%). Other nationalities had a cumulative share of around 30%, and separately all below 3%. Because the Camino the Santiago is a hiking network across all of Europe, multiple paths across the continent are sharing the same destination. The French/Spanish Camino was the most popular with 54.7% recipients, followed by the Portuguese Camino with 20.8%. The other 8 Caminos had all a separate share below 6.5%. The most popular starting point for the Camino is Barcelona with over 27.6% percent of the hikers starting from here. 9.6% start just over the Spanish border in the French Saint-Jean-Pied-de-Port, 8% start the trail for Porto in Portugal. Remarkable is that 6.6% of the hikers start from Tui, a Spanish city in the same region of Galicia at 103km distance, which is the closest distance to Santiago in which people are still eligible to receive the official certificate for 'completing' the Pilgrims route. The furthest removed starting point from Santiago is the French city Le Puy, at a distance of 1300km, just 0.9% of the hikers start from this location. The most common occupation 'empleados' which translates to general employees has a share of 23.8%. Other shared occupations among the hikers are students (18%), 'intellectual workers'/academics (14.2%), pensioners (13.2%), technicians (9.7%), professors (7.1%), and functionaries (5.4%). Other professions have a frequency of 2% each.

Smaller sample sizes of a couple of hundreds are used to research multiple different motives of hikers for walking the route, besides only for selecting on religious motives. According to H. Kim (2019), which summarized multiple questionnaires among the hikers on the route, 33% of all the hikers (both religious and non-religious) walked the route for cultural reasons. This share is slightly lower than hikers who answered with religious motives (36%). Other hikers walked the Camino out of curiosity (23%), sport (17%), spiritual (5%), and others (17%). Interviewed hikers had the Spanish, Portuguese, German, Irish or English nationality. Most hikers interviewed walking the Camino are male (43.4%) against female (56.6%). The biggest group of hikers has completed a bachelor's program (34.3%), while 18,9% finished a master's degree, and 4.7% a Doctorate/Ph.D. Hikers who only finished High school counted for 25.5% and other people with a professional qualification besides higher education counted for 13.3% of the hikers. By far the most popular form of accommodation is the so-called Pilgrim hostels (80%), followed by hotels (24.8%), and (26.1%). Remarkable is that the least popular type of accommodation was the campsite with only 4% of the hikers making use of this. (S. Amaro, 2018)

<http://oficinadelperegrino.com/wp-content/uploads/2016/02/peregrinaciones2019.pdf>

1.2. Via Francigena

According to Daily (2018), around 40.000 hikers completed the Via Francigena route in 2017. The majority of the people enjoy hiking the trail during the spring and summer months, especially in April, May, and August. Most people were between the ages of 51 – 60 and 41 – 50. In total, 67% of the sample group falls in the age category of 45 – 65. There is a small difference between women (56%) and men (44%) and most people prefer to walk in pairs than alone. The main motivation for the modern pilgrims lies in the environment of the trail and the experiential journey of the hikers. Results from one research conducted among the hikers of the pilgrim trail show that many nationalities walked the trail. Of the sample (n=208), the majority was European (71%), and combined with the Northern Americans (26%). Furthermore, Asia counted for 8%, and less than 1% came from either South America or Africa. Italy was the most represented country with 26% of the responders originating from Italian soil followed by 24% of the hikers coming from the United States. 69% had at least completed a bachelor's degree. Most people were employed full time (47%) and retired people make up for 31% of the sample group, which falls in line with the relatively high age of the group. Remarkable is that just over 56% of the responders is married, and that 19% never got married and that 17% are divorced. On an easy yes/no question, 51% of the people said they were not religious. Of the 45% who answered yes, most were catholic (66%). All but 1 of the 54 Italians participating in the research mentioned that they walked to route out of religious motive. Protestantism (24%) was the second biggest religion presented. The last 11% mentioned being Christian Orthodox, Christian "other", Buddhism or non-religious. This means that around 90% of the participants is Christian one way or another. Of the religious responders, 28% claimed to visit the church at least once a week, and 38% claimed to visit the church several times a month to several times a year. Just 2% of the religious hikers mentioned never visiting a church. Table 3 below show the main sources of motivation of the participants to hike the Via Francigena based on a given valuation on a scale of 1 (not) to 10 (a lot). The secular motives (such as adventure, escaping normal life, and cultural/historical education) have a twice as much mean valuation as sacred motives (such as religious motives, adding meaning to one's life, or fulfilling a promise). The motives with the highest mean score are the scenery along the route (7.9), adventure (6.6), physical and mental challenge (6.6), accessibility of Via Francigena route information (6.3), and History and cultural education (6.2). Remarkable is that while by far the most participants of the research are religious, motivation based on religion is considered low with mean scores of 3.7 and lower. (Daily, 2018)

Table 2: Mean values for each motive of hikers walking the Via Francigena.

Category	Motivation	Mean (scale of 0–10)
Secular	The scenery along the route	7.9
	Adventure	6.6
	Physical and mental challenge	6.6
	Accessibility of <i>Via Francigena</i> travel information	6.3
	History and cultural education	6.2
	To escape one's usual surroundings	5.6
	To meet people with a common identity	3.3
	Conveniences along the route	2.4
	<i>Mean of secular motives</i>	5.6
Sacred	To add meaning to life	5.8
	Self-discipline	5.6
	To become closer to God(s) or divine forces	3.7
	To bond with family and friends	3.3
	To participate in religious or cultural events along the route	2.7
	To fulfill a promise or vow	1.7
	To commemorate a dead person	1.5
	To gain salvation or show penitence for sins	1.3
	Religious obligation	.9
	A desire for physical healing or miracle	.8
	<i>Mean of sacred motives</i>	2.7

Most people learned about the existence of the route via Friends and family (23.1%), followed by books & literature (22.1%), social media (17.8%), travel organizations (5.3%), or other (23.1%). Most people walked the route on foot (93%) and just over 6% did the route by bicycle. Around half of the hikers is walking a segment of the route and started in Italy (47.1%). More than a fifth walked the whole route (22.1%) and started in the United Kingdom. Other hikers started in between the UK and Italy, with Switzerland (15.6%) as the third most popular starting point. Just 2.5% started in France, Belgium, or Germany, and 12.7% claimed to start on in another country. 80.8% of the people finished in Rome, and 17.8% finished in other locations in Italy. (Daily, 2018)

Most people did or plan to buy a souvenir (67.6%). Most people have hiked the trail, or their segment, in 1 – 19 days (42.8%). The second biggest group hiked for 20 -39 days (24.5%), and 15.9% took 40 – 69 days for their journey. 8.6% for 70 – 89 days, and for 90+ days it was 6.8%. The most popular souvenir acquired was the Pilgrims' Credential. The reason for buying a souvenir was for having a memory of the trip. This reason was twice as popular as proof of achievement as a reason. Over 80% celebrated their success at the end of their journey one way or another. (Daily, 2018)

6. Other interesting sources

https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/England-documents/walking_routes_case_study_15_nov_2016_final.pdf

<https://www.degruyter.com/document/doi/10.1515/9783110660715-008/html>

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